



# Pre-Response Conference

GEAR UP TN EXTERNAL EVALUATOR

# Agenda For Today's Meeting

- Introduction
- Conduct High-level Review of RFP Process
- Review entails the following RFP Sections:
  1. Introduction
  2. RFP Schedule of Events
  3. Response Requirements
  4. General Contracting Information & Requirements
  5. Evaluation & Contract Award
- Review the following RFP Attachments:
  - 6.1. Response Statement of Certifications & Assurances
  - 6.2. Technical Response & Evaluation Guide
    - 6.2.1 GEAR UP TN Framework
    - 6.2.2. Minimum Required Services
    - 6.2.3. GEAR UP TN Logic Model
  - 6.3. Cost Proposal & Scoring Guide
  - 6.4. Reference Questionnaire
  - 6.5. Score Summary Matrix
  - 6.6. Pro Forma Contract
- Q&A

# RFP Coordinator Contact Info

- Name: Douglas Whitcomb
- Title: Sourcing Analyst
- Office: Central Procurement Office
- Phone: 615-507-6727
- Email: [Doug.Whitcomb@tn.gov](mailto:Doug.Whitcomb@tn.gov)
- Prospective Respondents must direct communications concerning this RFP to the following person designated as the RFP Coordinator:
- **Unauthorized contact about this RFP with employees or officials of the State of Tennessee except as detailed below may result in disqualification from consideration under this procurement process.**

# Disclaimer

- All answers provided during the Conference are not official until the State answers in writing and amends the solicitation.
- Questions must be submitted in writing prior to the Written “Questions & Comments” Deadline in order to receive an official answer from the State.

# RFP Section 1 - Introduction

- The purpose of this RFP is to procure an external evaluator for Tennessee's state GEAR UP grant to finalize the program evaluation plan, conduct quantitative and qualitative analysis, provide assistance in completion of U.S. Department of Education Annual Performance Reports, provide annual needs assessments for participating high schools, and produce formative and summative evaluation reports. More information about the project deliverables are located in the *Pro Forma Contract*.
- In 2017, the Tennessee Higher Education Commission (THEC) received a \$24.5 million seven-year Gaining Early Awareness and Readiness for Undergraduate Programs (GEAR UP TN) grant, a federal discretionary grant program designed to significantly increase the number of low-income students who are prepared to enter and succeed in postsecondary education. Through GEAR UP, the US Department of Education (USDOE) provides six- or seven-year grants to states to provide services to students in high-need middle and high schools and through the first year of college. These services include: providing financial aid information and application assistance, encouraging enrollment in rigorous and challenging coursework, and improving the number of students who graduate from high school and enroll in postsecondary education.

# Introduction Continued

- THEC will serve a cohort of approximately 3,250 students from the class of 2023 beginning in the 8th grade and continuing through their first year of college. Additionally, GEAR UP TN will provide services to approximately 2,750 priority seniors at participating high schools each year of the grant. GEAR UP TN schools will be selected through a competitive application process.
- To be eligible, high schools must meet two requirements: 1) have a college-going rate at or below the state average, based on the most recent three years of data supplied by THEC; and 2) have at least 50 percent of students eligible for free or reduced-priced lunch. Eligible high schools will partner with: 1) feeder middle school(s) with at least 50 percent of students eligible for free or reduced-priced lunch; 2) their local board of education; 3) at least one postsecondary institution; and 4) at least two community-based organizations or local businesses to form a GEAR UP TN Collaborative.
- THEC will select participating schools, award GEAR UP TN subcontracts, and begin grant implementation in the spring of 2018 with student service implementation beginning fall 2018. Awards will be made to eligible high schools that apply in collaboration with partners (as specified above), meet all other proposal requirements, and rank highest among applicants based on an external panel review and interview process.

# RFP Section 2- RFP Schedule of Events (may change via RFP Amendment)

EVENT	TIME (central time zone)	DATE
1. RFP Issued		5/15/2018
2. Disability Accommodation Request Deadline	2:00 p.m.	5/18/2018
3. Pre-response Conference	2:00 p.m.	5/23/2018
4. Notice of Intent to Respond Deadline	2:00 p.m.	5/24/2018
5. Written "Questions & Comments" Deadline	2:00 p.m.	5/29/2018
6. State Response to Written "Questions & Comments"		6/5/2018
7. Response Deadline	2:00 p.m.	7/13/2018
8. State Completion of Technical Response Evaluations		8/2/2018
9. State Opening & Scoring of Cost Proposals	8 a.m. - 4:30 p.m.	8/3/2018
10. State Notice of Intent to Award Released <u>and</u> RFP Files Opened for Public Inspection		8/6/2018
11. End of Open File Period	2:00 p.m.	8/13/2018
12. State sends contract to Contractor for signature	2:00 p.m.	8/20/2018
13. Contractor Signature Deadline		8/21/2018

# RFP Section 3 - Response Requirements

- Section 3 details the response requirements:
  - Prescribes response format and forms
  - Delivery and organization of the response
  - Response and respondent Prohibitions
  - Other information pertaining to RFP responses
- Response consists of two parts:
  - Technical Response – Completed using RFP Attachment 6.2., Technical Response & Evaluation. Includes mandatory requirements (Pass/Fail), general qualifications and experience items, and technical qualifications, experience and approach items all of which must be addressed with a written response and, in some instances, additional documentation.
  - Cost Proposal - A Cost Proposal must be recorded on an exact duplicate of the RFP Attachment 6.3., Cost Proposal & Scoring Guide. Sealed separately from the Technical Response (as detailed in RFP Sections 3.2.3., *et seq.*).

# RFP Section 4 - General Contracting Info & Requirements

- Contains information on RFP process and actions that can be taken by the State of Tennessee to update the RFP and associated documents
- Contracting requirements – Must provide Certificate of Insurance. Register with the Tennessee Department of Revenue for the collection of Tennessee sales and use tax or show proof of exemption.

# RFP Section 5 - Evaluation and Contract Award

## — Evaluation Categories & Maximum Points

The State will consider qualifications, experience, technical approach, and cost in the evaluation of responses and award points in each of the categories detailed below (up to the maximum evaluation points indicated) to each response deemed by the State to be responsive.

EVALUATION CATEGORY	MAXIMUM POINTS POSSIBLE
General Qualifications & Experience (refer to RFP Attachment 6.2., Section B)	10
Technical Qualifications, Experience & Approach (refer to RFP Attachment 6.2., Section C)	60
Cost Proposal (refer to RFP Attachment 6.3.)	30

# RFP Section 5 – Cont.

- Evaluation Process – The State of Tennessee will utilize a proposal evaluation team to evaluate each respondent's response and oral presentation session.
- Scores are calculated by the RFP Coordinator by calculating the sum of the Technical Response section scores and the Cost Proposal score and recording the resulting number as the total score for the subject Response (refer to RFP Attachment 6.5., Score Summary Matrix).

# RFP Attachment 6.1. Response Statement of Certifications & Assurances

- The Respondent must sign and complete the Statement of Certifications and Assurances and it must be included in the Technical Response (as required by RFP Attachment 6.2., Technical Response & Evaluation Guide, Section A, Item A.1.).

RFP ATTACHMENT 6.1

**RFP # 32101-18102 STATEMENT OF CERTIFICATIONS AND ASSURANCES**

The Respondent must sign and complete the Statement of Certifications and Assurances below as required, and it must be included in the Technical Response (as required by RFP Attachment 6.2., Technical Response & Evaluation Guide, Section A, Item A.1.).

The Respondent does, hereby, expressly affirm, declare, confirm, certify, and assure ALL of the following:

- The Respondent will comply with all of the provisions and requirements of the RFP.
- The Respondent will provide all services as defined in the Scope of the RFP Attachment 6.1., RFP RFP Contract for the total Contract Term.
- The Respondent, except as otherwise provided in this RFP, accepts and agrees to all terms and conditions set out in the RFP Attachment 6.1., RFP RFP Contract.
- The Respondent acknowledges and agrees that a contract resulting from the RFP shall incorporate, by reference, all proposal responses as a part of the Contract.
- The Respondent will comply with:
  - the laws of the State of Tennessee;
  - Title VI of the federal Civil Rights Act of 1964;
  - Title IX of the federal Education Amendments Act of 1972;
  - the Equal Employment Opportunity Act and the regulations issued there under by the federal government; and,
  - the Americans with Disabilities Act of 1990 and the regulations issued there under by the federal government.
- To the knowledge of the undersigned, the information detailed within the response submitted to this RFP is accurate.
- The response submitted to this RFP was independently prepared, without collusion, under penalty of perjury.
- No amount shall be paid directly or indirectly to an employee or official of the State of Tennessee as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Respondent in connection with this RFP or any resulting contract.
- Both the Technical Response and the Cost Proposal submitted in response to this RFP shall remain valid for at least 120 days subsequent to the date of the Cost Proposal opening and thereafter in accordance with any contract pursuant to the RFP.
- The Respondent affirms the following statement, as required by the Iran Divestment Act Tenn. Code Ann. § 12-12-111: "By submission of this bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each bidder is not on the list created pursuant to § 12-12-106." For reference purposes, the list is currently available online at: <http://www.tn.gov/government-services/office-of-public-integrity/divestment>.

By signing this Statement of Certifications and Assurances, below, the signatory also certifies legal authority to bind the proposing entity to the provisions of this RFP and any contract awarded pursuant to it; if the signatory is not the Respondent (if an individual) or the Respondent's company President or Chief Executive Officer, this document must attach evidence showing the individual's authority to bind the Respondent.

**DO NOT SIGN THIS DOCUMENT IF YOU ARE NOT LEGALLY AUTHORIZED TO BIND THE RESPONDENT**

SIGNATURE: \_\_\_\_\_

PRINTED NAME & TITLE: \_\_\_\_\_

DATE: \_\_\_\_\_

RESPONDENT LEGAL ENTITY NAME: \_\_\_\_\_

RFP # 32101-18102  
18

# RFP Attachment 6.2. Technical Response & Evaluation Guide

- Attachment 6.2. can be categorized into four (4) sections:
  - A. Section A: Mandatory Requirements – Pass/Fail
  - B. Section B: General Qualifications & Experience Items – 10 point total
  - C. Section C: Technical Qualifications, Experience & Approach - Items scored on 5 point scale. Section worth 60 points

# RFP Attachment 6.3. Cost Proposal & Scoring Guide

- The cost proposal comprises of two parts:
- Cost proposal form is RFP Attachment 6.3.
- Section valued at 30 maximum points (see RFP Section 5)

# RFP Attachment 6.4. Reference Questionnaire

- RFP Attachment 6.4. Reference Questionnaire must be completed by at least three (3) different individuals. (See RFP Attachment 6.2. Section B – General Qualifications & Experience Items, B.17.)
- The Respondent will be solely responsible for obtaining fully completed reference questionnaires and including them in the sealed Technical Response (follow instructions in RFP Attachment 6.2. Section B – General Qualifications & Experience Items, B.17.)

# RFP Attachment 6.5. Score Summary Matrix

- The Summary Score Matrix is used by the State of Tennessee to summarize the results of the RFP.
- Provided to respondents during the Open File Period (See RFP Schedule of Events)

# RFP Attachment 6.6. *Pro Forma* Contract

- The Pro Forma Contract is the Contract that will result from the RFP.
- It contains the Scope of Work, Term of Contract, Payment Terms and Conditions, Mandatory Terms and Conditions, and Special Terms and Conditions.

# Questions

- Thank You for attending today's meeting.